SUBJECT
CLINIC RESPONSIBILITY FOR PROCESSING CLIENT REGISTRATION, PFI, CDI

APPROVED
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I. PURPOSE

To establish procedures for processing client information and services rendered data affecting billing practices in the Department of Behavioral Health.

II. POLICY

The clinics will be responsible for the completion of the Client Registration, Appointment Scheduler/Charge Data Invoices and assistance with the completion of the Financial Screening to ensure revenue for service.

III. PROCEDURES

A. PATIENT INFORMATION DATA/PATIENT FINANCIAL INFORMATION

1. Define if the client is new or returning. Request their identification card.

   New Clients: New clients are defined as clients who have never been seen at any clinic in the San Bernardino County Behavioral Health system, and therefore have no medical record number. This is found by researching the client name and/or social security number in the SIMON locator screen. See the in-depth procedure for locator screen in the SIMON MANUAL. Only NEW clients need to be registered in SIMON.

2. Prepare the Registration form or enter the client information directly into the Registration screen in SIMON. See the in-depth procedure for Client Registration in the SIMON MANUAL. The registration procedure must be completed and input before the Financial Interviewer can interview the client and input the financial data.

3. The client's legal name should be used when being registered. The name must match the client's insurer, e.g., Medi-cal, Medicare, or private insurance.

4. The medical record number is issued by SIMON after the registration data is input. See the in-depth procedure for client registration in the SIMON MANUAL. Specifically, at BHRC at the time of registration the clerk will make copies of the Medi-cal card, Client I.D., Insurance card, Medicare card, etc., and send to the Financial Evaluation Office. The clerk will also input the POE and get the Eligibility verification code number.

5. After the client registration procedure is complete, the Financial Interviewer will complete the financial interview by telephone, with one (1) exception: at the Behavioral Health Resource Center, the clerk will call the Financial Evaluation office and notify them that an interview needs to be completed. The clerk will ask the client to be seated in the lobby and wait to be called by the Financial Interviewer.

6. Upon completion of the financial interview, the Financial Interviewer will relay the required information to the clerk. The clerk will obtain necessary signatures, complete client payment agreement, I.D. card, Medicare forms, and any other forms as requested by the interviewer for billing. If the client is seen at the Behavioral Health Resource Center, the Financial Interviewer will complete the necessary forms and notify the clerk that the client has returned to the lobby. The Financial Interviewer will give the client code and expiration date to the clerk and input this information into the Simon system.

7. Returning/Continuing Clients: The client will need an interview with the Financial Interviewers' Office if there is any change in income, dependents, or if their liability date has expired or will expire within 45 days using the SIMON MH 164 Report.

B. SERVICES-APPOINTMENT ROSTER/CHARGE DATA INVOICE

1. The Charge Data Invoice (CDI) and/or Appointment roster provides the formal documentation for reporting and billing services provided to clients. These forms are used to document the services that are entered into SIMON, the Behavioral Health computer reporting system.

   a. Appointment Roster. printed from the computer in the A.M. It is then separated and distributed to the appropriate clinician. At the end of each day the completed roster is placed in a box for clerical staff to do SIMON input the following A.M. Upon completion of input, the MHS 902 report is requested. The following morning an audit of CDI's and the 902 report are used to verify accuracy and completeness. When corrections are required, they are done immediately, to create accurate billing.

b. Unscheduled clients: Services are recorded on "Charge Date Invoices" and the same procedure as above is followed. Refer to the in-depth procedure in the SIMON MANUAL.

C. STORAGE OF APPOINTMENT ROSTER AND CDI'S

1. Appointment Roster and CDI's must be stored by each clinic until all audits are completed and there are no appeals in process.

2. The Fiscal Section will notify clinic supervisors in writing of audit Completion and at that time shredding can be done.